

STEP 2: Creating & Managing Events

Now that you have volunteers in the system the next step is to add events and assign volunteers to those events. This one-page checklist highlights the tasks you need to complete. Refer to the pages following this checklist if you require more in-depth instructions.

- ☐ **Create Your Event.** There are 2 types of events: one-time and recurring. One-time is for activities like book fairs, carnivals, and auctions. Recurring is for activities that require volunteers on a daily or weekly basis.

Volunteer Builder>Events>Create New Event>Save

When entering information about your event:

- You can indicate if the event is recurring by putting a checkmark in the 'Recurring Event' box
- You will only see volunteers with a permission level of Volunteer Chair or higher in the drop down. If you don't see the person who will be running the event it's possible they are in the system but without the appropriate permission level. Refer to "Assign Permissions" in the previous section for help.
- The system puts a checkmark in the "Allow Volunteers to see this event" box. There might be times you want to deselect this, for example if the event is more of an internal activity like 'office help'. Simply click on the box to remove the checkmark.

- ☐ **Assigning Volunteers to Events.** You can assign volunteers directly to an event (if you know they are interested and available) or you can recruit volunteers by emailing them to see if they can help. You can also have volunteers enter their own hours by assigning themselves to tasks. See 'Set Up School' section for details on how to select this option.

*Volunteer Builder>Events>Assign (link beside event)>Recruit
Volunteers>Search>Select>Assign Selected or Email Selected*

If you select "Assign Selected": You will have the opportunity to enter specific tasks the volunteer will do and edit the date/time the volunteer will be helping.

If you select "Email Selected": You will send a personalized note to each volunteer asking if they are interested and available to help.

Note on recurring events: After you select 'Assign Selected' those volunteers will be assigned to the next occurrence of your event. You can click on the dates at the top of the chart to move between dates.

That's It! You have created events and assigned volunteers to event(s). The next step is generating reports and communicating with your volunteers. Proceed to page 19 to start.